

PRINT DEVICE ACQUISITION PROCESS

(“VENDOR” = current holder of State Master Contract)

ASSESSMENT

1. Agency Representative begins an SPO Determination Form for BOSS Led Procurements and sends it to Agency Procurement Officer.
2. Agency Representative notifies DoIT Print Management (DoIT.PrintMgmt@Illinois.gov) stating need to acquire (either new or refresh of currently leased) print device(s).
3. DoIT Print Management schedules a VENDOR assessment of your requirements to determine number and models of multi-function devices required.
NOTE: VENDOR assessment will include discussion/review of requirements to retain or replace existing print devices with the following considerations and objectives:
 - eliminate all personal/local print devices (statewide)
 - re-size devices in accordance with type and volume utilization
 - reduce overall number of devices
 - maintain and/or increase functionality
 - increase efficiency of related services
 - reduce cost (both utilization and device maintenance)
4. Agency Representative, with the assistance of the Agency IT Coordinator and the VENDOR, completes (Equipment Cost Justification Form - ECJF) adhering to the following guidelines:
 - Document format and size cannot be altered
 - All on-site print and imaging function related devices must be listed, to include: standalone printers, network printers, desk top/local printers, copiers, fax machines, scanners, etc...
 - Print devices must be grouped according to geographic areas within the site (i.e. floor, wing, work area, etc...)
 - All information requested on the left side of the page is required (i.e. print volumes, devices, and costs)
5. Agency Representative sends the completed ECJF to DoIT Print Management (DoIT.PrintMgmt@Illinois.gov) for final review/revision. Email must specify:
 - Agency name
 - Agency Representative name
 - Site location
 - Dates of expiration for any current copier/print device leases
6. DoIT Print Management sends the ECJF to VENDOR for their electronic signature.
7. VENDOR returns signed ECJF to DoIT Print Management (DoIT.PrintMgmt@Illinois.gov).
8. DoIT Print Management sends approved and signed ECJF via email to Agency Representative.

SITE PREPARATION

1. Agency Representative, with assistance of Agency Telecom Coordinator, submits a **Telecommunications Service Request (TSR)** to DoIT for installation of LAN wiring/jack for any requested device to be located in an area without a LAN jack
THIS WORK MAY REQUIRE SEVERAL WEEKS TO COMPLETE!
2. Agency Representative submits a **work order** to appropriate Facilities staff for installation of electrical outlet for any requested device to be located in an area without an electrical outlet in place
THIS WORK MAY REQUIRE SEVERAL WEEKS TO COMPLETE!

PROCUREMENT

NOTE: to ensure timely acquisition and installation, actions must be executed simultaneous to “PRE-INSTALL”

1. Agency Representative reviews the ECJF and signs in agreement.
2. Agency Representative forwards the ECJF to their SPO for signature.
3. Agency Representative creates **Procurement Business Case (PBC)**
 - Required for all orders exceeding \$10,000
 - *DO NOT* check “Post to IFB” box
 - *DO NOT* forward for approvals yet

NOTE: If PBC is not required, proceed to Step #4

4. Agency Representative creates **Order for Release (OFR)** in IGPS for devices specified/approved on ECJF.
NOTE: For questions/ assistance on creation of OFR, contact CMS Help Center (Mary Hanselman at 217-782-3382)
 - Equipment quantities should be in increments of 36 (i.e. 2 machines with 36 month lease will have a quantity of 72)
 - List each device first followed by options

- May list multiple locations, but each location must have “Ship to” location specified
 - “Bill To” and “Ship To” information must be specified to be considered complete
 - Order must be left at **Draft Status 405**
5. Agency Representative attaches approved ECJF to the PBC. NOTE: *If PBC is not required, proceed to Step 7*
 6. Agency Representative inserts the *VENDOR* information into the Award Info tab on the PBC and starts approval process.
 7. Agency Representative prepares an **Equipment Lease/Finance Approval Request (ELFAR)**.
NOTE: *If volume of information exceeds any form field, specify “see attached” and submit an attachment with ELFAR*
 - a. Use the PSD # from the Draft OFR.
 - b. Enter name of the Agency Representative in the appropriate box; Agency Representative must sign that box.
 - c. Section 1, Description of Equipment
Enter model # and quantity of *VENDOR* devices (from Master Contract) being leased; include any add-ons such as 3 hole punch or fax module, plus the monthly cost.
Example:
(D081-568-0090 W7830P – 1 @ \$ 303.78 X 36 months = \$ 10,936.08)
(D081-568-0282 Single Fax – 1 @ \$ 12.63 X 36 months = \$ 454.68)
(D081-568-5230 5330PT – 2 @ \$146.73 = \$ 293.46 X 36 months = \$ 10,564.56)
(D081-568-5235 Single Fax – 2 @ \$ 14.22 = 28.44 X 36 months = \$ 511.92)
 - d. Section 2, Location of Equipment. Enter site name and street address where equipment will reside.
 - e. Section 3, Primary Use of Equipment. Explain funding source.
 - f. Section 4, Name of *VENDOR*. Fill in *VENDOR* information from State Master contract.
 - g. Section 5, Transaction Term. Enter estimated start and end date. The term is ALWAYS 36 months unless otherwise approved by BCCS Print Management, Tom Karaianis or Dante Watson.
 - h. Section 6, Initial Purchase Price of Equipment or Principle Value
Although equipment will be leased, the purchase price of the equipment must be listed.
Example:
(D081-568-0080 W7830P – 1 @ \$ 5,414.00)
(D081-568-0182 Single Fax – 1 @ \$ 383.00)
(D081-568-5200 5330PT – 2 @ \$ 3,811.00 = \$ 7,622.00)
(D081-568-5205 Single Fax – 2 @ \$ 431.00 = \$862.00)
 - i. Section 7, Deductions (not applicable – no entry required).
 - j. Page 2, complete the top section only. Multiple Year Lease or Rental (the cost of overages is .025 per page for all machines.)
 8. Agency Representative prepares an **SCO-560** (Comptroller’s form).
 9. Agency Representative attaches ELFAR and SCO-560 to PBC. NOTE: *If PBC is not required, proceed to Step 10*
 10. Agency Representative emails CMS BOSS (Tom Karaianis at Tom.Karaianis@Illinois.gov)
 - a. to notify of PBC approval (*email must specify OFR and PBC numbers*)

OR

 - b. to forward ECJF, ELFAR, and SCO-560 forms (*email must specify OFR number and “NO PBC REQUIRED”*)

NOTE: *Approvals (from CMS, Ethics Commission, etc... require 2+ weeks to complete)*
 11. CMS signs the ELFAR and vendor OFR.
 12. CMS BOSS (Tom Karainis) will notify Agency via email (with 4 OFRs and ELFAR attached) that the lease has been approved and to proceed with INSTALLATION.

INSTALLATION

PRE-INSTALL

NOTE: to ensure timely acquisition and installation, actions must be executed simultaneous to “PROCUREMENT”

1. Agency submits **ESR (with Network Printer Install Information Form)** to DoIT
(DoIT.ESR.AllAgencies@illinois.gov)
ESR activities scheduling contingent upon location, number of devices, submittal lead time, and DoIT service demand queue (typical turn-around is 20-24 business days from submittal and equipment acquisition)
2. DoIT assesses ESR and schedules date of install with all Stakeholders (DoIT, Agency, *VENDOR*)
Provides Agency a FAQ/Overview document describing install, duration of print interrupt/outage, link to Enterprise Printing Site and instructions
3. Agency notifies affected End Users of install date
Distributes DoIT provided FAQ/Overview document describing install, duration of print interrupt/outage, link to Enterprise Printing Site and instructions

INSTALL (on day of scheduled installation)

1. DoIT (Wintel Admin, Wintel Software, Midrange UNIX, Mainframe Apps Support, LAN Svcs, EUC) establishes audio bridge with Agency contact and *VENDOR*
2. DoIT coordinates installation and configuration process with Agency contact and *VENDOR*
Agency contact may be asked to assist with installation (physical plugging, printing device configuration, attaching device logistical information labels, etc...)

DoIT may or may not have staff on site – this will be pre-determined during PRE-INSTALL assessment (contingent upon site location, installation requirements, and Agency contact competencies)

3. Agency contact completes and attaches DoIT provided Information Label to new device
4. Agency contact notifies affected End Users to proceed with adding access to new device via Enterprise Printing Site
References FAQ/Overview document containing link to Enterprise Printing Site and instructions

END USER TRAINING (on or immediately after day of scheduled installation)

1. Agency contact and *VENDOR* conduct functional device training with affected End Users

DEVICE REMOVAL/DISPOSAL

Leased Devices

1. Agency contact and *VENDOR* coordinate removal or lease expired device(s).

Agency Owned Devices

1. Agency coordinates and schedules removal/disposal of retired device(s) independent of BCCS.

DoIT Owned Devices

1. Agency Representative, with assistance of Agency IT Coordinator, submits an Enterprise Service Request (ESR) to DoIT for removal/disposal of retired devices.
2. DoIT assesses ESR and schedules date of retired device removal/disposal with Agency.
3. DoIT performs retired device removal/disposal.

BILLING

1. Upon completion of installation, Agency Representative will complete a Supplemental Document and send it to the appropriate *VENDOR* rep for signature. Lease will begin either on the day of installation or on a date following installation specified by the *VENDOR*. *VENDOR* currently bills on the first of the month following installation.

Print Device Acquisition Process Checklist

Required Forms	Date Completed	Sent To	Date Sent	
Equipment Cost Justification Form (ECJF) See "Assessment" in Printer Device Acquisition Process				
Procurement Business Case (PBC) See "Procurement" in Printer Device Acquisition Process				
Equipment Lease/Finance Approval (ELFAR) See "Procurement" in Printer Device Acquisition Process https://cms.partner.illinois.gov/icpr/Forms/Documents/Forms/AllByCategory.aspx				
Telecommunications Service Request (TSR) See "Site Preparation" in Printer Device Acquisition Process				

Enterprise Service Request (ESR) – install See “Installation – Pre-Install” in Printer Device Acquisition Process				
Network Printer Install Information Form See “Installation – Pre-Install” in Printer Device Acquisition Process				
SPO Determination Form See “Procurement” in Printer Device Acquisition Process				
Order for Release (OFR) (IGPS) See “Procurement” in Printer Device Acquisition Process				
Enterprise Service Request (ESR) – removal See “Device Removal/Disposal” in Printer Device Acquisition Process				